

**Syllabus<sup>1</sup>**  
**Gerontology 502: Marketing and Shifts in Consumer Decision Making**  
**Fall 2013**

**Time:** Wednesday 4:00pm-6:50pm

**Location:** GER 230/On Line

**Instructors:** Gregory Bearce, MAG, MBA, MDiv (NHA)  
Michael Townsend, MBA

**Information Tech Support:** Jim Alejandre 213-740-2590

**Classroom (Conference) Phone:** TBD

**Office Hours:** 3-4PM, Wednesday

**Telephone:** G. Bearce - 818-730-3700 (Cell)  
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### **Course Overview**

Successful organizations increasingly rely on marketing to understand and to align with their customers. Marketing to and for older adults is no different, but also requires an understanding of this unique market. This course relies upon both theory and practice to provide the marketing tools needed for success.

Having worked as colleagues and as competitors in the senior housing industry, the co-instructor will bring a unique, real life perspective to the pitfalls and potential of both marketing tactics and strategic business development.

### **Learning Objectives**

**Students will be able to:**

- 1) Appreciate the need for marketing in aging services management
- 2) Gain competency and confidence in marketing to and for older adults
- 3) Identify current trends and issues in marketing and relate them to the needs of the older adult marketplace
- 4) Make an effective sales presentation
- 5) Write a marketing plan
- 6) Understand marketing expense norms in the industry
- 7) Distinguish between marketing, advertising, sales, promotion, public relations, and branding
- 8) Understand “real life” obstacles to marketing success and learn tactics to overcome them
- 9) Distinguish between effective and ineffective marketing collateral
- 10) Utilize the Internet and social media to achieve marketing objectives

## **Class Assignments**

### **Weekly:**

Each week, there will be an assignment posted for you to do before the next week's class. About half the time, you will be required to read an article(s) posted on line and provide your perspective on how the article might apply to marketing products or services to and for older adults. You will also comment on at least two of your classmate's thoughts on the posted articles. Other times you will be asked to find articles that relate to the topic for the coming session. You will need to briefly describe the article content and how it relates to issues in marketing. During each class session (usually at the beginning of class), time will be spent discussing the parameters of the next week's assignments as well as covering some of the on-line discussions that might require additional input or discussion.

During the first week of class, each student is asked to find two articles that relate to current issues in marketing to older adults. **Refer to the first week's assignments to get more information regarding article content.**

### **Sales Presentation:**

You will prepare an eight minute (maximum) oral sales presentation using PowerPoint for a service of your choice that targets older adults. You shall assume your sales presentation is being made to potential users or their influencers, as represented by the instructor and your classmates. PowerPoint submittals are due by 6pm on the Monday before your presentation in order for the instructors have time to print and review them. Sales presentations will be made on October 9<sup>th</sup> and 16<sup>th</sup> **per a schedule that will be published after your PowerPoint submittals.**

### **Marketing Plan**

A marketing plan is an essential strategic tool that aligns all areas of marketing endeavor towards the objectives of the organization. This course provides insights into the development of each component of the marketing plan. By developing a marketing plan for the service you chose earlier in the class for the sales presentation, you will demonstrate your understanding and assimilation of the course's offerings. Using the same service as in the Sales Presentation is important so that you may incorporate that work and build momentum. The marketing plan shall consist of these eight components: executive summary, situation analysis, goals, strategy, tactics, implementation, control, and exhibits. All Marketing Plans are due in writing on 11/11/13.

### **Marketing Plan Presentation:**

The oral presentation of your marketing plan at the conclusion of the course is intended to demonstrate your marketing competence and your confidence in your plan. This final project oral presentation should be 10 minutes maximum in length and should use a PowerPoint presentation (due by 6pm the Monday before your presentation) to illustrate the eight components of your plan. Marketing plans will

be presented on 11/13 and 11/20. Like the sales presentation, your marketing plan will be presented to your classmates and the instructor, but on this occasion they will represent a group of angel investors (sources of funding). Marketing plans will be presented in reverse order of the sales presentations.

**Notes for on line students:**

On line students should use a recorded video format publically uploaded to YouTube for both their sales and marketing plan presentations. The PowerPoint should be incorporated into the video with the student controlling the progression of slides. Slides may be interspersed with videos clips or referred to in the background in one continuous video. The IT assistant(s) are always able and willing to answer questions about your chosen method of presentation. Please be in contact with us about how you plan to present – well before presentations are due – so that we may assure you that your methodology will work.

Online students are also required to post comments on all presentations, as evidence of their class participation.

**Required Reading:**

Cherney, Alexander, Marketing Plan Handbook, 3<sup>rd</sup> edition, 2011

Optional:

Cherney, Alexander, Strategic Marketing Management, 6<sup>th</sup> edition, 2011

We will also post articles and excerpts from various sources on a regular basis. These postings will be found in the discussion section of Blackboard. Readings are chosen for many reasons, including: to foster creative thinking; to promote class participation and discussion; to insure relevancy in a fast paced environment, and to supplement the experiences of the instructor.

**Grading:**

Weekly Assignments (readings, comments, postings, etc) 30%  
 Be sure to go on-line regularly. We will be looking for and anticipating your presence in this forum. Up to 2 pts will be given per week for your participation for the fifteen weeks of class (30 pts total).

<b><u>Projects</u></b>	<b><u>Date Due</u></b>	
Sales Presentation (PowerPoint submittal)	10/02	5%
Sales Presentation (8 Minutes)	10/09 & 10/16	20%
Marketing Plan (electronic submittal)	11/11	30%
Marketing Plan Presentation (12 Minutes)	11/13 & 11/20	<u>15%</u>
Total		100%

### **Notes on late submissions:**

Submitted assignments are due electronically by 7PM Pacific Time on the date indicated. Submissions that are late by up to 4 hours will be penalized by one half of a grade point. Submissions from 4 – 24 hours late will be penalized by one grade point; 24-72 hours – 1.5 grade points; more than 72 hours – not accepted.

### **Statement for Students with Disabilities**

Any student requesting academic accommodations based on a disability is required to register with Disability Services and Programs (DSP) each semester. A letter of verification for approved accommodations can be obtained from DSP. Please be sure the letter is delivered to me (or to TA) as early in the semester as possible. DSP is located in STU 301 and is open 8:30am-5pm, M-F. The phone number for DSP is 213-740-0776.

### **Statement on Academic Integrity**

USC seeks to maintain an optimal learning environment. General principles of academic honesty include the concept of respect for the intellectual property of others, the expectation that individual work will be submitted unless otherwise allowed by an instructor, and the obligations both to protect one's own academic work from misuse by others as well as to avoid using another's work as one's own. All students are expected to understand and abide by these principles.

Scampus, the Student Guidebook, contains the Student Conduct Code in Section 11.00, while the recommended sanctions are located in Appendix A:  
<http://www.usc.edu/dept/publications/SCAMPUS/gov/>. Students will be referred to the Office of Student Judicial Affairs and Community Standards for further review, should there be any suspicion of academic dishonesty. The review process can be found at: <http://www.usc.edu/student-affairs/SJACS/>.

### **Course Schedule/Outline**

#### **08/28 (Week One)**

Introductions, Class Overview and Assignments – G. Bearce

Introduction to Marketing – M. Townsend

**Assignment 1:** Introduce yourself to the class by providing some information about yourself for others in the class. Begin with your name, whether or not you are presently employed and what you do. If you are a full time student, talk about why you have chosen this present degree work and what you hope to do following completion of the degree. Online students should post this information by Tuesday, August 27<sup>th</sup> at 6pm. Those attending class will be asked to make their introduction in front of the group.

**Assignment 2:** Your second assignment this week, to be completed by Tuesday (9/03) before the next class, is to find two articles related to recent change either in the marketplace for products and services for older adults or in marketing itself.

Please find and email copies to both instructors at the email addresses at the top of the syllabus, so that we can have them ahead of time for review and comment, if necessary. Articles can be taken from publications such as the Wall Street Journal (particularly their weekly Marketplace section), the New York Times, AARP.org, Long Term Care, CAHF.org, Leading Age, Advertising Age, Entrepreneur, USC sites to which you have access, and other sites that specialize in aging services, or journals (such as the Journals of Gerontology) that provide articles of interest in the areas of research and/or analysis. Your articles may be used as assigned articles for reading during the semester or referred to by you when asked to comment on issues/articles of current interest.

### **09/04 (Week Two)**

A new day, a new way: understanding recent change: aging populations, the economy, the digital marketing revolution, globalization, etc. – G. Bearce and M. Townsend

**Assignment:** In preparation for this class you will find an article or question posted on-line by Thursday at 11pm of the previous week for you to read and discuss. Be sure to read and comment. Also, read your classmate's comments and respond. Further discussion will be held in class and notable posts will be shared.

### **09/11 (Week Three)**

Monte Cedro: A review of a new start-up, still in the premarketing phase – G. Bearce  
Guest Speaker: Martha Tamburrano, CEO of Episcopal Communities and Services will be in class to take us through the rigor of developing a new senior community in today's environment.

**Assignment 1:** In preparation for this class you will find an article or question posted on-line by Thursday at 11pm of the previous week for you to read and discuss. Be sure to read and comment. Also, read your classmate's comments and respond. Further discussion will be held in class and notable posts will be shared.

**Assignment 2:** In the online forum after class, discuss the challenges being faced at Monte Cedro. What would you do if you were the CEO of this company? What should be their priorities?

### **09/18 (Week Four)**

Review of best practice advertising trends – G. Bearce  
Guest speaker: Josh Johnson, Senior Living developer, China - Marketing Senior Communities in China

**Assignment 1:** In preparation for this class you will find an article or question posted on-line by Thursday at 11pm of the previous week for you to read and discuss. Be sure to read and comment. Also, read your classmate's comments and respond. Further discussion will be held in class and notable posts will be shared.

**Assignment 2:** In the online forum after class, consider the advertisements that were presented. Which was your favorite? Why? What were two insights provided to you by Josh Johnson?

**09/25 (Week Five)**

Business to Business (B2B); request for proposals (RFPs); networking, associations, etc; marketing and the enterprise (sample budgets, interdepartmental relations, integration, etc.) – G. Bearce and M. Townsend

Guest Speaker: Steve Wright, marketing consultant for Martino & Binzer, Farmington, CT. Steve is based in Tacoma, Washington and has lectured on this topic on numerous occasions at the University of Washington, Seattle, WA. Steve is also the CEO of Wright Mature Market Services and has worked on scores of start-ups across the US and Canada.

**Assignment :** In preparation for this class you will find an article or question posted on-line by Thursday at 11pm of the previous week for you to read and discuss. Be sure to read and comment. Also, read your classmate’s comments and respond. Further discussion will be held in class and notable posts will be shared.

**10/02 (Week Six)**

Sales Presentations: story telling, selling yourself, dress for success, needs versus wants, features versus benefits, the laws of human influence – M. Townsend

**Assignment:** In preparation for this class you will find an article or question posted on-line by Thursday at 11pm of the previous week for you to read and discuss. Be sure to read and comment. Also, read your classmate’s comments and respond. Further discussion will be held in class and notable posts will be shared.

**10/09 (Week Seven)**

Student Sales Presentations – 8 minute each with 5 minutes of feedback - All

**Assignment:** For the online forum after class, please offer constructive comments for each of the sales presentations this week?

**10/16 (Week Eight)**

Student Sales Presentations (Continued) - All

**Assignment 1:** Read Chapters 1 and 2 of The Marketing Plan Handbook

**Assignment 2:** For the online forum after class: Please offer constructive comments for each of the sales presentations this week?

**Assignment 3:** For the online forum after class - Chernev quotes Winston Churchill in chapter one. Discuss the relevance of this insight as you begin to prepare your marketing plans. Do you have a personal/professional example illustrating the truth of Churchill’s remark?

**10/23 (Week Nine)**

Staffing; Business Development; marketing budgets; – G. Bearce

Marketing Plan Development: A step-by-step guide – M. Townsend

**Assignment 1:** Read Chapters 3 through 7 of The Marketing Plan Handbook.

**Assignment 2:** For the online forum after class - What will be the target market in your marketing plan? What segments or characteristics will you use in developing this target? Are they the “right” customers? Do your fellow students concur with your assessment and can you build a consensus amongst them that you are correct?

**10/30 (Week Ten)**

Advertising; legal requirements; use of models; branding; ad and collateral samples; direct mail; online/digital/web marketing – M. Townsend

**Assignment 1:** Read Chapters 8 through 12 of The Marketing Plan Handbook.

**Assignment 2:** For the online forum after class - Chernev quotes Peter Drucker in chapter eight. How does your marketing plan acknowledge this point of view? Do you agree? What experiences in your life affirm or reject this idea?

**11/06 (Week Eleven)**

Demographic trends; generational cohorts; ageless marketing; saying it to seniors - M. Townsend

**Assignment:** For the online forum after class - discuss your challenges and insights in preparing your marketing plans. The plans are due next week!

**11/13 (Week Twelve)**

Student marketing plan presentations - All

**Assignment:** Please offer constructive comments for each of the marketing plan presentations this week?

**11/20 (Week Thirteen)**

Student marketing plan presentations - All

**Assignment:** Please offer constructive comments for each of the marketing plan presentations this week?

**11/27 (Week Fourteen)**

No class – Holiday

**Assignment:** For the online forum this week, discuss the value of marketing plans as related to overall enterprise management. How can the marketing plan align an entire organization? What might be some pitfalls to avoid?

**12/04 (Week Fifteen)**

Ethics; Crisis Communication; experiential marketing; evolution of marketing concept; future of marketing – G. Bearce and M. Townsend

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<sup>1</sup> 8/18/13; 7pm